

Exports and Reports

Most of the data exports are simple queries that create “csv” files. CSV files can be loaded into Excel or other spreadsheet programs, as well as into another database, like MS-Access. See [Opening a CSV File in Excel](#) for details.

Parameters

Many of these exports have similar parameters. Some of the common ones are explained here:

- Date Range - Picklist which will automatically set the From & Thru Dates, Dates can also be set manually.
- Assoc Group - Restricts the Export to only include Associate in a particular group, has 2 special options
 - *All* - All associates will be included, regardless of what groups they may or may not be in
 - *None* - This restricts the export to only include associates who have not been added to any groups, useful when trying to find associates that still need to be added to associate groups

List of Exports & Reports

Associates

Contact List

Export - List of all associates, by default it has 1 row per assoc, with Primary contact info (phone,email, and address.)

Other Formats (1 or more rows per assoc)

- Phones: All phone numbers for each associate(1 or more rows per assoc)
- Emails: All emails for each associate
- Addresses: All addresses for each associate

Additional Parameters:

- Assoc Group - Restrict to only include associates in a particular group.
- Include Inactive - By default inactive associates are excluded from this export. Select this option to have them included.

XT User List

Export - List all of the associates with XT Users. Including Username, Recovery Email, Last Login Date, and the date of last change to password or recovery email. Can be filtered on Assoc Group

Crops

Crops List

Exports - Crop list including Latin Name, Life Cycle and Canada Grade Table information.

Can be filtered on Crop Group.

Varieties List

Export - Crops with Latin and variety names.

Can be restricted to a single crop or by Crop Group

Custom

Custom exports available upon request.

Fields

Acres By Crop, Variety, Seed Class

Export - Sum of acres passed for each variety & seed class for the year.

Can be filtered on Crop Year Range. By default range is a single year, but it can be modified to include acreage counts from previous years.

Field Inspection Results

Export - Detailed field listing with acres applied for, rejected passed etc. Some of the details included:

- Producer Info (Associate Name, ID & Phone Number)
- Field Detail (Field #, Crop, Variety, GPS, Class, Identity)
- Field Dates (Date entered in PH, Last Update)
- Field Results (Acres passed/rejected/cancelled)

Filtered on Crop Year Range. By default range is a single year, but it can be modified to include acreage counts from previous years.

Fields where the Inspection has been cancelled are not included, unless "Include Cancelled" option is selected.

Field Inspection Usages

Export - One Row per field with inspection plan. Each row will list the usages being inspected for.

Filters on Crop Year, if left blank export will default to current crop year. Optionally filter on a field number prefix **Supervisor**

Field Listing - Export

List of fields by county for all supervisors. Crop Year is required, if left blank export will default to current crop_year.

Optionally filter on Field Prefix, From Date (Fields updated since date specified), and Supervisor Area.

Columns in Export

Supervisor / County / Producer ID / Producer Name / Grower Name
Field # / Crop / Variety / Relative Maturity / Previous Usage / Seed Class
Acres: Applied / Passed / Cancelled / Rejected
Status (Cancelled, Rejected, Hold, Passed, Inspected, Apply)
First Production Year / Crop Limitation Years / Foundation Option
Date Planted / Identity / Genetic Origin

Field Inspection Report

See Field Inspection Templates

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Supervisor Field Listing - PDF

Report - Lists Fields by county for a Supervisor (opens in new window) The report may take some time to generate, depending on the number of fields found for that Supervisor/Year

Contains much of the same information as the Export version, but as a formatted PDF file.

Financial

Account Aging

Export - Shows the balance aging for each customer and billing type, restricted on charge type.

Account Aging must be calculated, the form will show the last time the calculations were done, and has an option "Do refresh" which will rerun the calculation before the export, so the Account Aging data is up to date.

For more information about the format of the export see the Documentation for the Account Aging screen.

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Account Status

Report - Creates a PDF similar to the invoice, but shows all charges/credits/payments on the associates accounts, through a given date. Requires a starting invoice (only charges/credits/payments after selected invoice will be included)

Thru Date is optional, if left blank, Today's date will be used.

Only invoiced charges will be included, unless "Include Uninvoiced" option

Financial Activity Report

HTML Report - Shows various summaries and totals over a given time period. See Financial Activity Report for more details about each section in the report.

Invoice Detail 2v

HTML Report - A report that lists each invoice created within the date range, and shows the detail of each invoice (history, balance forward, new charges)

This report is usually used after closing a billing period. but can also be run for a single associate over a greater amount of time.

Can be optionally restricted to a single associate.

If getting invoices for all associates, From & Thru Dates are Required.

If getting a single associate, From & Thru Dates are optional.

Invoices and Service Charges

Export - Lists service charges within the date range, and invoice the charge was assigned to (if exists).

Can be restricted to a single associate.

Invoice Summary List

Export - Shows the most recent invoice for each customer, if that invoice was not \$0. If the Cutoff Date is provided, the query will get the most recent invoice prior to the date given.

Only active associates will be included. To show invoices from Inactive associates, check the "Include Inactive" box. This export may have some very old invoices at the end.)

Note: The amounts on this export may not match the amount due on the Invoice PDF. This is because the PDF looks for payments made after the invoice date, and applies them against the balance due, so customer don't end up overpaying. See Invoices for more.

Payment List

Export - Lists all payments entered between two dates. Export can optionally be restricted for a single associate.

Output can be an unformatted CSV, or a formatted Spreadsheet.

Samples Billed & Unbilled

Lists all samples that were received within the date range, and all (if any) charges entered for that sample

Service Fees: By Crop

Shows the fees defined for testing crops of different types.

Service Fees: By Crop Group

Shows the fees defined for crop groups

Service Fees: Other

Shows the fees you set up that are the same for all samples

Organics

Export - List of process plan steps that have 'Pending' status.

Seed Testing

Crop Testing Rules

Shows the rules you have set up for testing crops of different types.

Defined Remarks

Pre-defined remarks for usage on reports.

Lab Activity

Shows various summaries and totals over a given time period. See Lab Activity Report for details about each section.

Lab Report Summary

List samples that were received, completed, printed, or emailed within the date range.

PH Billed Support

These are the tests we counted to determine your PH usage fee.

Sample Context

Exports the sample in process during the specified date range. One row per sample, each row shows the Lab #, Crop/Variety, Tests requested and the Dates it was received, completed, and released.

Sample Detail

Extended info about samples that were created within a date range. Contains :Seed Id, Sam Id, Seed Class, Lot Number, Owner Id, Lot Owner, Owner Lot Name, Lab Number, Name, Analyst, Received Date, Status, Inspection Number, Labelled Lot No, Growers, Fields, Analysis Print Date, Component, Test Name, Germination Purity Date, Purity, Other Crop, Other Weed, Inert Hard, Dormant, Viable, Pls, Germ Start Date, Germ Date, Tz Test

Sample Results Extended

Summary result of samples - Contains one row per sample, with Percentage results for Purity (including other crops, weeds & inert matter), TZ, Germination (including hard, dormant and viable.) The date restriction uses the analysis print date.

Seed Regulatory Samples

Export of Regulatory samples between two dates.

Sample Test Detail

All of the detail rows for all samples in the date range